

User Guide Addendum

iEmcee

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1.0 – Introduction

This **User Guide Addendum** is a supplement to the eSign Emcee User Guide found here: <http://esignemcee.net/emceedocs/esignemcee.pdf>.

It contains detailed instructions on how to **Register** the iEmcee Apple Application (iEmcee App) and **Sign** electronic documents using your Apple iPad or iPhone.

2.0 – Getting Started

2.1 – Supported Devices and OS Versions

1. **iPad** – iOS 8.4+
2. **iPhone** – iOS 8.4+

2.2 – Installing the iEmcee App

To use the Apple iPad or iPhone option for signing ceremonies, you must first download the iEmcee App on your mobile device. The iEmcee app is available for free from the Apple App store.

2.3 – Ceremony, Sign, & Settings Tabs

The iEmcee App is designed to enable eSign Emcee signing ceremony presentation and verification (**Ceremony** tab), as well as signature capture (**Sign** tab). A third **Settings** tab enables you to configure/set up the iEmcee App. All three tabs are located at the bottom section of your mobile Apple device.

2.4 – eSign Emcee Demo Site

The iEmcee App is pre-configured to work with the eSign Emcee demo site, located at: <http://esignemcee.net/emceedemo>

Upon installation of the iEmcee App you can test sign demo ceremonies on the eSign Emcee demo site right away. Prior to iEmcee App registration, the 'Ceremony' tab will default to the eSign Emcee demo site since no eSign Emcee user identity is yet available for the iEmcee App to use. This also allows users who are new to eSign Emcee to register on the eSign Emcee demo site from within the iEmcee App itself. Once registered on the demo site as an eSign Emcee user, the iEmcee App can then be registered as an eSign Emcee client by using the same user credentials provided to create a profile on the eSign Emcee demo site.

2.4.1 – eSign Emcee Demo



eSign
Emcee

Welcome to eSign Emcee Demo

Thank you for your interest in eSign Emcee.
Our demonstration will provide you the opportunity
to sign a document electronically using our patent-pending GUI.



If you are a new visitor to our site, click the
Register button below to get started.

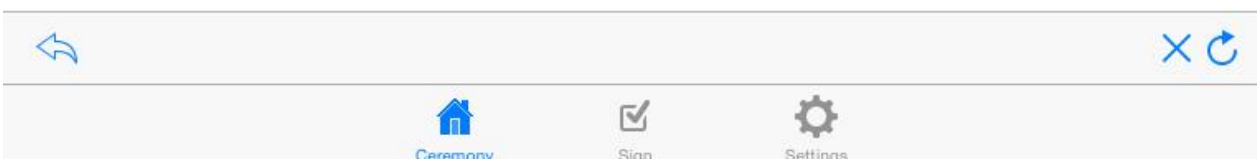
Register



If you have already registered with eSign Emcee,
click the Run button below to run the demo.

Run

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2.5 – iEmcee App Registration

The iEmcee App is an eSign Emcee client that must be registered with an eSign Emcee server in order to execute signing ceremonies. Registration involves obtaining a User Identity from an eSign Emcee server for a particular user profile.

This User Identity serves two purposes:

1. It allows the eSign Emcee server to identify the user.
2. It allows the user to sign documents.

2.5.1 – To Register

To register, click the 'Settings' tab to bring up the **Server Selection and Registration Page** similar to the one shown on the next page.

Proceed as follows:

- A. Enter the eSign Emcee **Username** and **Password**, provided when registering on the eSign Emcee demo site or your assigned Username and Password for a dedicated eSign Emcee server defined in the 'Host' section of the 'Settings' tab.
- B. Click **Generate URN**. A 'URN' code is a user identifier that enables the eSign Emcee server to bind the mobile device to an actual user profile.
- C. Once the server generates a URN code it will appear in the **URN** field. Note: This may also be provided by the eSign Emcee administrator.
- D. Click **Register** to register the iEmcee App and URN with the eSign Emcee server (the eSign Emcee demo by default in this case).

An eSign Emcee "**Registered as**" identity (digital certificate) will be downloaded and automatically imported into the iEmcee App. Login to the eSign Emcee server is automatically performed using this identity.

2.5.2 – Server Selection and Registration Page

SERVER

Host

Test Connection

Reset Ceremony Session

USER PROFILE

Client ID

Username

Password

Generate URN

Enter your eSign Emcee user profile credentials and generate a URN to register this device

REGISTRATION

URN

Register

Generate a URN above in order to register this device to your eSign Emcee profile

OPTIONS

Line Smoothing

Auto Refresh

Error Logging

Local Security

IDENTITY

Registered as: e6286d7276d1899a5243048c67da5d1d

Issued by: eSignEmcee.net

Expires: 2016-02-21

Register this device to obtain an eSign Emcee signing identity

Ceremony

Sign

Settings

2.5.3 – Additional Registration Information

1. URN's have a limited lifespan and must be used to register a device within a certain time frame. URNs are only used for device registration purposes and are discarded once they are used or expire.
2. The iEmcee App uses RSA cryptographic keys to digitally sign documents. A digital certificate that identifies the device-owner pair is generated by the server and is bound to a specific eSign Emcee user profile.

In order to use the iEmcee App with a different eSign Emcee user profile, a new user identity is required. Acquiring a user identity is always performed with the registration process. Registration is also required if the iEmcee App is to be used with a different eSign Emcee server.

3. In some cases a device UDID registration may be required when requesting a URN. This will install a special profile on your device in order to obtain a unique device identifier and complete the registration process. If this step is required, the app will automatically redirect to safari in order to download and install the temporary device profile and redirect back to the app's settings screen when done. Just follow the instructions on your device.

2.5.4 – iEmcee App and eSign Emcee Identity Removal

When an eSign Emcee identity is imported following successful device registration, the cryptography keys and associated certificates (used for personalized login and signing) are stored within the device in secure storage.

If the iEmcee App is removed from your mobile device, all the iEmcee App's settings are deleted except for your imported eSign Emcee identity.

To explicitly remove the identity from the device, simply swipe your finger (in either direction) across the identity details on the 'Settings' tab to bring up the eSign Emcee **Identity Deletion** menu.

See 'Identity Deletion' example, next page.

Note: Re-registration of an already registered device will automatically replace the current identity.

2.5.5 – eSign Emcee Identity Deletion Page

REGISTRATION

URN

Register

Generate a URN above in order to register this device to your eSign Emcee profile

OPTIONS

Line Smoothing

Auto Refresh

Error Logging

Local Security

eSignEmcee Identity

Delete

Registered as: e6286d7276d1896a5243048c67da5d1d

Issued by: eSignEmcee.net

Expires: 2016-02-21

Register this device to obtain an eSign Emcee signing identity

Ceremony

Sign

Settings

2.6 – Signing Ceremony Login

There are several ways to log in to a Signing Ceremony.

2.6.1 – Silent (Automatic) Login

Once you have registered with an eSign Emcee server, silent (automatic) login will be enabled. Clicking the **Ceremony** tab on your mobile device will perform a silent login and present the 'Signing Ceremonies' list page. Clicking the **Start Link** in your email invitation to esign will do the same.

NOTES:

1. *The result of registration is receiving an eSign Emcee identity in the form of cryptographic keys and corresponding digital certificate. This certificate (which represents the device to you from eSign Emcee's perspective) is not only used to sign documents, but can also be used to log you into your eSign Emcee account. Since the certificate can identify you, no username or password is required. The certificate identifies you (like the username does) and authenticates you (like the password does).*
2. *With an eSign Emcee identity available, the iEmcee App will always automatically attempt to log in to the configured (or default) eSign Emcee server and present your list of pending signing ceremonies. If you are using the demo site, more signing ceremonies can be created with any browser and these will be available to be signed. If you add new signing ceremonies while those pending are being displayed, simply refresh the page to update the Signing Ceremonies list.*

2.6.2 – Session Reset

You can also perform a silent login by going to your **Settings** tab and then clicking the **Reset Ceremony Session** button during an active signing ceremony session. This function will terminate any active login session and perform a silent certificate login, returning you to the 'Signing Ceremonies' list page.

2.6.3 – Manual Login

There may be situations where manual login is needed. For example, it is possible for your signing ceremony session to "timeout" requiring you to log in again manually.

Should a session timeout occur, you will be brought to the eSign Emcee Presenter 'Welcome' page. There, click the **Ceremony** tab (see example next page).

2.6.3.2 – Login Page

After clicking the 'Ceremony' tab, you will be brought to the 'Log In' page, seen below. Here, you can click on **Mobile Login** for automatic login. It is not necessary to input a User Name and Password.

NOTE: To be logged in automatically, click the 'Certificate Login' button.

Log In

User Name:

Password:

Log In

Home Forgot Password

Mobile Login

Certificate or Mobile login Identity certificate is required. See Device Registration in Settings

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2.6.3.3 – Signing Ceremonies List

After clicking 'Certificate Login', you will be brought to the 'Signing Ceremonies' page, where a list of your Active, In Progress, Complete, and Closed signing ceremonies is presented.

To begin executing a new signing ceremony or resume execution of an existing signing ceremony, click anywhere within the appropriate line.

NOTE: To open a Signing Ceremony, click anywhere in the line describing the documents to be signed.

User Status	Cer Status	Category	Name	Description
Completed	Completed	Loans	Demo21	Demo21 Signing Session
Completed	Completed	Loans	Demo21	Demo21
Closed	Closed	Loans	eSign Emcee Demo Session 2-10-2015 12:20:47 AM	A Demo Session for eSign Emcee
Completed	Completed	Loans	eSign Emcee Demo Session 2-10-2015 12:31:08 PM	A Demo Session for eSign Emcee
InProcess	InProcess	Loans	eSign Emcee Demo Session 2-10-2015 5:20:04 PM	A Demo Session for eSign Emcee
InProcess	InProcess	Loans	eSign Emcee Demo Session 2-20-2015 2:07:54 AM	A Demo Session for eSign Emcee
InProcess	InProcess	Loans	eSign Emcee Demo Session 2-20-2015 1:58:11 PM	A Demo Session for eSign Emcee
InProcess	InProcess	Loans	eSign Emcee Demo Session 2-21-2015 6:00:38 PM	A Demo Session for eSign Emcee
InProcess	InProcess	Loans	eSign Emcee Demo Session 2-21-2015 6:00:45 PM	A Demo Session for eSign Emcee

Page 3 of 3

The 'Signing Ceremonies' list contains a 'User Status' column that indicates the current status of logged-in user of each signing ceremony shown:

- **Active:** Indicates a new signing ceremony that currently logged-in user has not yet begun.
- **In Progress:** Indicates a signing ceremony that currently logged-in user was started previously but was not completed.
- **Complete:** Indicates currently logged-in user completed signing ceremony.
- **Closed:** Indicates a completed signing ceremony whose documents have been "handed back" to the host application.

The Signing Ceremonies list contains a 'Cer Status' column that indicates the current status of each signing ceremony shown:

- **Active:** Indicates a new signing ceremony that has not yet begun.
- **In Progress:** Indicates a signing ceremony that was started previously but was not completed.
- **Complete:** Indicates a completed signing ceremony.
- **Closed:** Indicates a completed signing ceremony whose documents have been "handed back" to the host application.

2.7 – Device Orientation

Both portrait and landscape device orientations are supported to improve reading and signing usability. The smaller screen of the iPhone does introduce some usability issues, specifically with the 'Ceremony' tab and interaction with signing ceremonies. This can be improved by using the Apple multi-touch features of the device – to "pinch-zoom" and scroll in and around the page – to improve page readability.



2.8 – Other Configuration Settings

The following additional configuration settings are indicated in the example that follows on the next page.

- A. **Change Default Server** – The iEmcee App comes pre-configured to work with the eSign Emcee demo server. It can also be configured to work with any eSign Emcee server.

To change the default server, enter the eSign Emcee server URL in the 'Host' section of the 'Settings' tab and click on **Test Connection** to test secure communications with the new server.

It is important to note that the iEmcee App can only work with one server at a time. If the app was registered with a particular user profile / server pair and the app is to be used with a different user profile or a different server, it must be registered again.

In some cases, a particular eSign Emcee server may be configured to require a specific "ClientID". If this is the case, the correct ClientID must also be provided along with Username and Password for registration purposes. The eSign Emcee server administrator will provide this ClientID, if so required.

- B. **Line Smoothing** – For Mobile signatures captured on the device itself, smoother signature lines may be desired than are possible due to the low capture frequency of the iPad or iPhone hardware. This feature can be enabled in the 'Settings' section.

Note that this feature only affects signature rendering results and does not modify the underlying raw signature data captured.

- C. **Error Logging** – This feature can be enabled to capture iEmcee App specific execution details for analysis, if required. Error Logging should normally be set to "Off" in order to maximize application performance.
- D. **Info** – The "Info" button (the circle with the letter i in it) is available to access licensing and app version information.
- E. **Local Security** – If enabled, this option will use the device's authentication capabilities to authenticate the user when signing a document or performing certain security sensitive actions. TouchID is the default authentication mechanism if available. On devices without TouchID, passcode authentication will be used if enabled in the device settings.
- F. **Auto Refresh** – This feature will automatically refresh the ceremony tab contents every time it is switched to.

2.8.1 – Other Configuration Settings Page

iPad 1:16 PM 73%

SERVER

Host

Test Connection

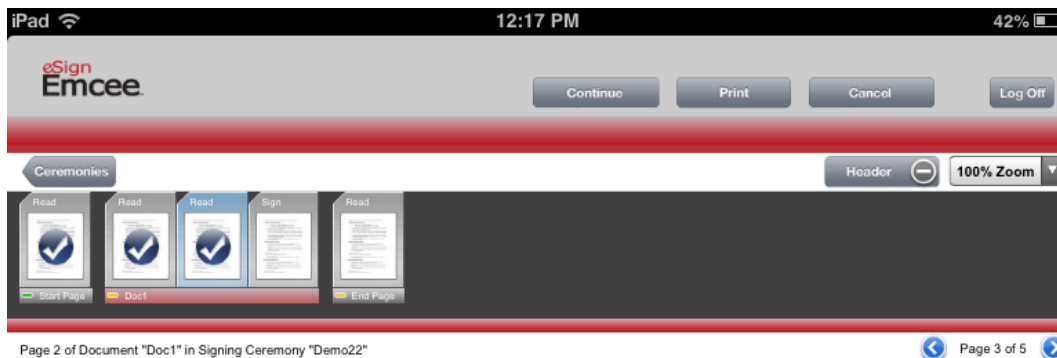
Reset Ceremony Session

OPTIONS

Line Smoothing	
Auto Refresh	
Error Logging	
Local Security	

3.0 – Signing with Apple iPad or iPhone

The iEmcee App enables use of both 'Mobile' and 'Pad' signature types to electronically sign a document with your mobile device. On the applicable 'Sign' page, you first click the desired signature spot to indicate the location being signed. The iEmcee App will then automatically switch to the signing tab.



**eSign
Emcee**

9. Approval Signatures

Joe Smith Vice President, Sample Savings and Loan
Lender

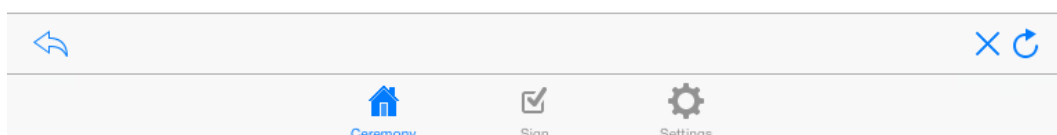
Mobile Sign Here >>

John Doe
Borrower

Mobile Sign Here >>

Jane Doe
Borrower

Pad Sign Here >>



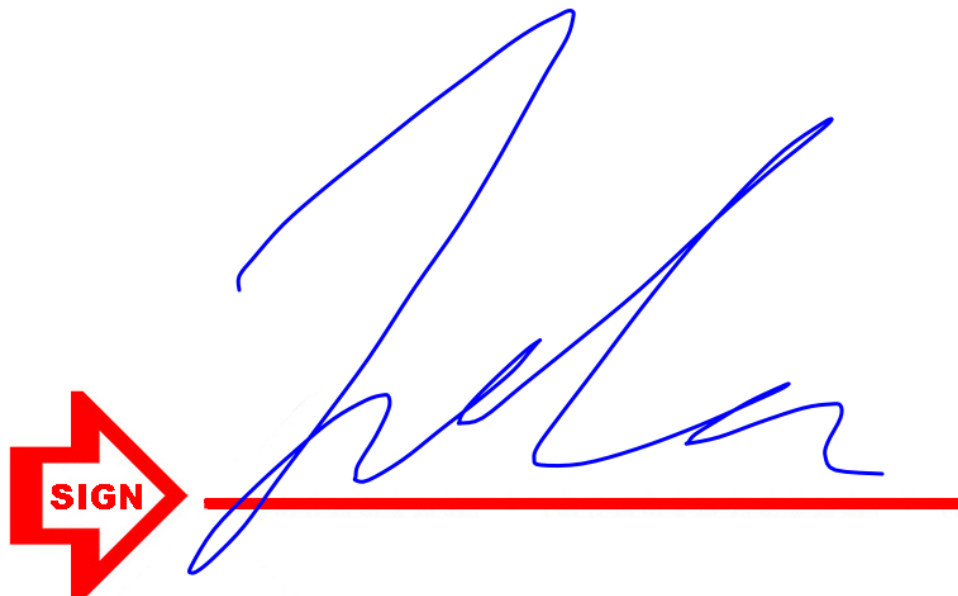
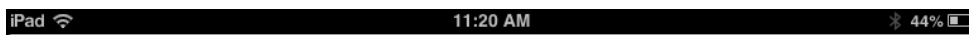
3.1 – Mobile Signing

To sign a Mobile signature spot, you will sign directly on your iPad or iPhone screen. This mode is indicated with a Red Signature Line on the 'Sign' page.

3.1.1 – Mobile Sign and Send

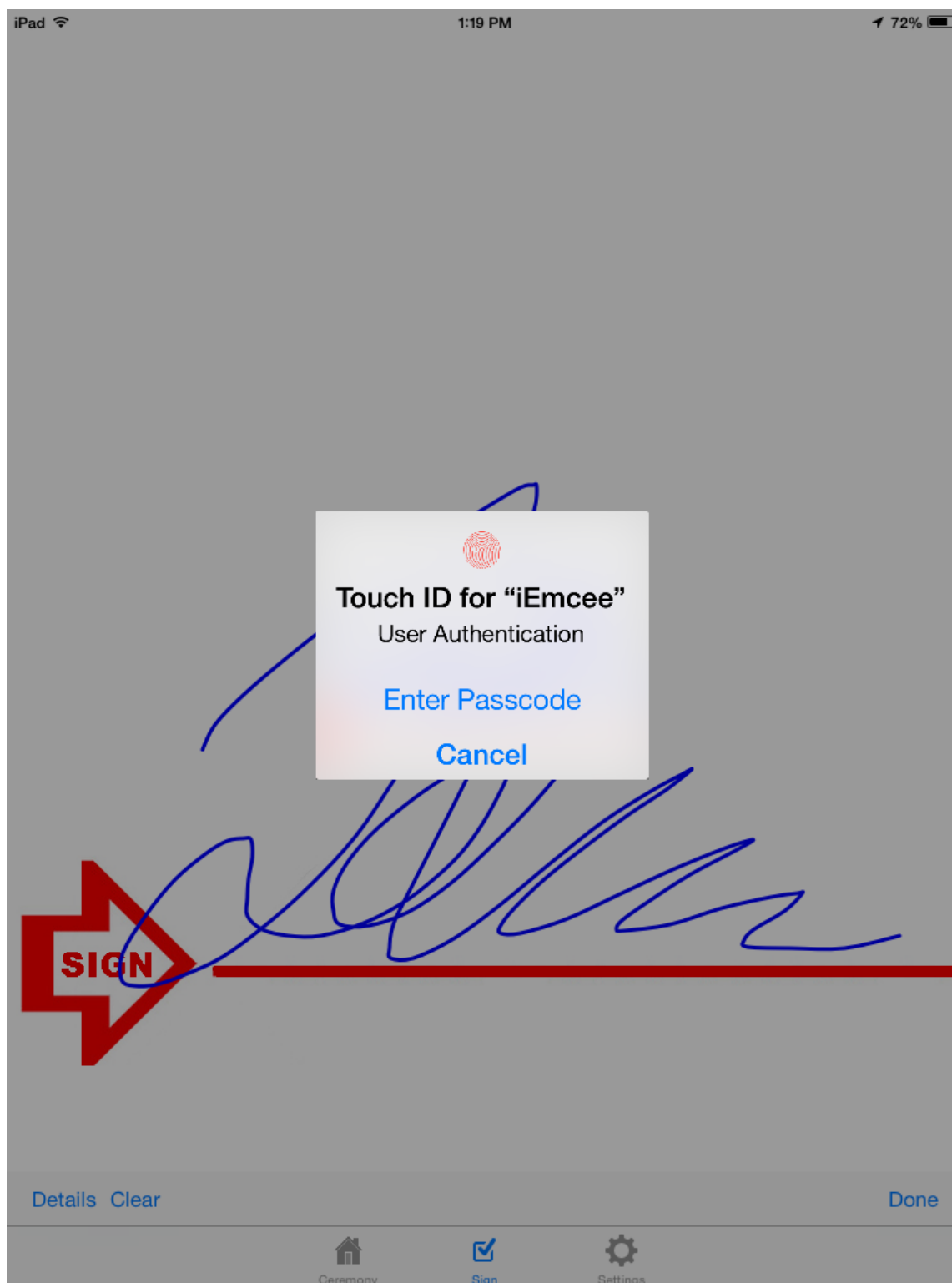
Simply sign with your finger or mobile device stylus and click 'Done' to transmit the signature details to the eSign Emcee server.

NOTE: You can clear the page with the 'Clear' button anytime and re-sign before clicking the 'Done' button.



3.1.2 – User Authentication

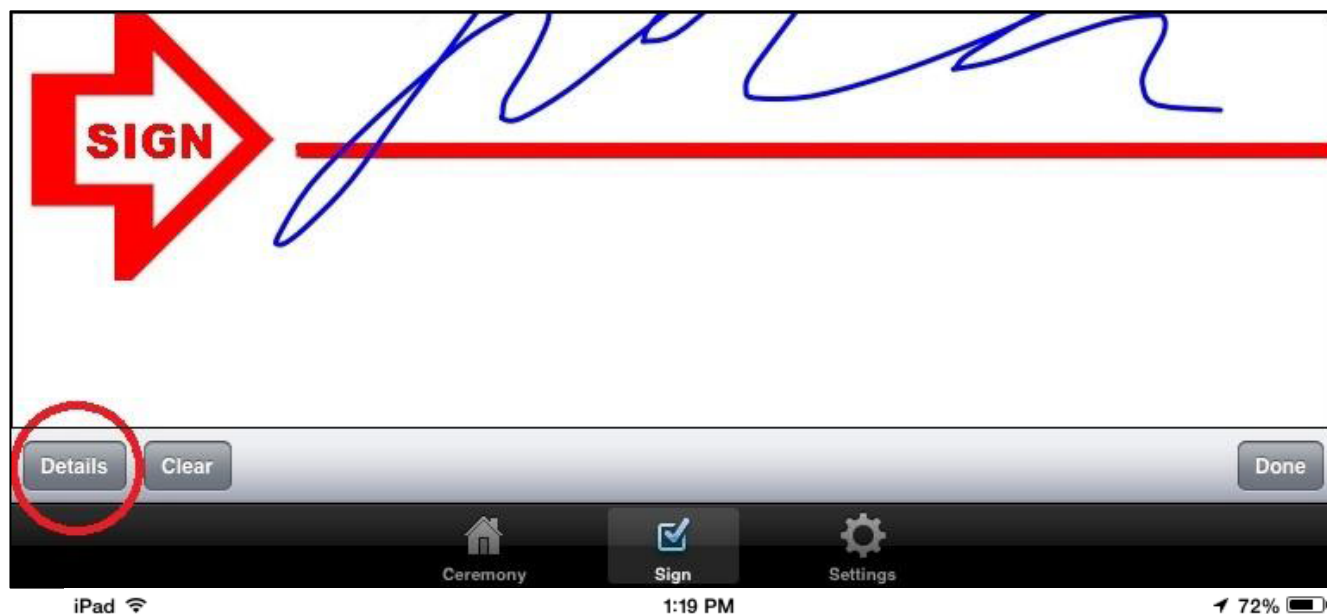
If local security is enabled in the iEmcee settings, the device will prompt you for your fingerprint or the device passcode depending on the device physical capabilities. If so prompted, you will have to pass this user authentication step before the signature is sent to the server.



3.1.3 – Signature Information

By default the name and email associated with each signature is read from the logged in user profile. Device registration in the settings screen will automatically save the Emcee user profile details as defaults. This information can be changed by accessing the signature information screen. To open the signature information window simply click on the “Details” button. Any location information can be entered manually in the Location section. To also include the current GPS coordinates click on the Location icon to the right of the location field.

NOTE: To retrieve GPS location information, Location services must be enabled in the device settings.



SIGNATURE INFORMATION

You may change the name and email address

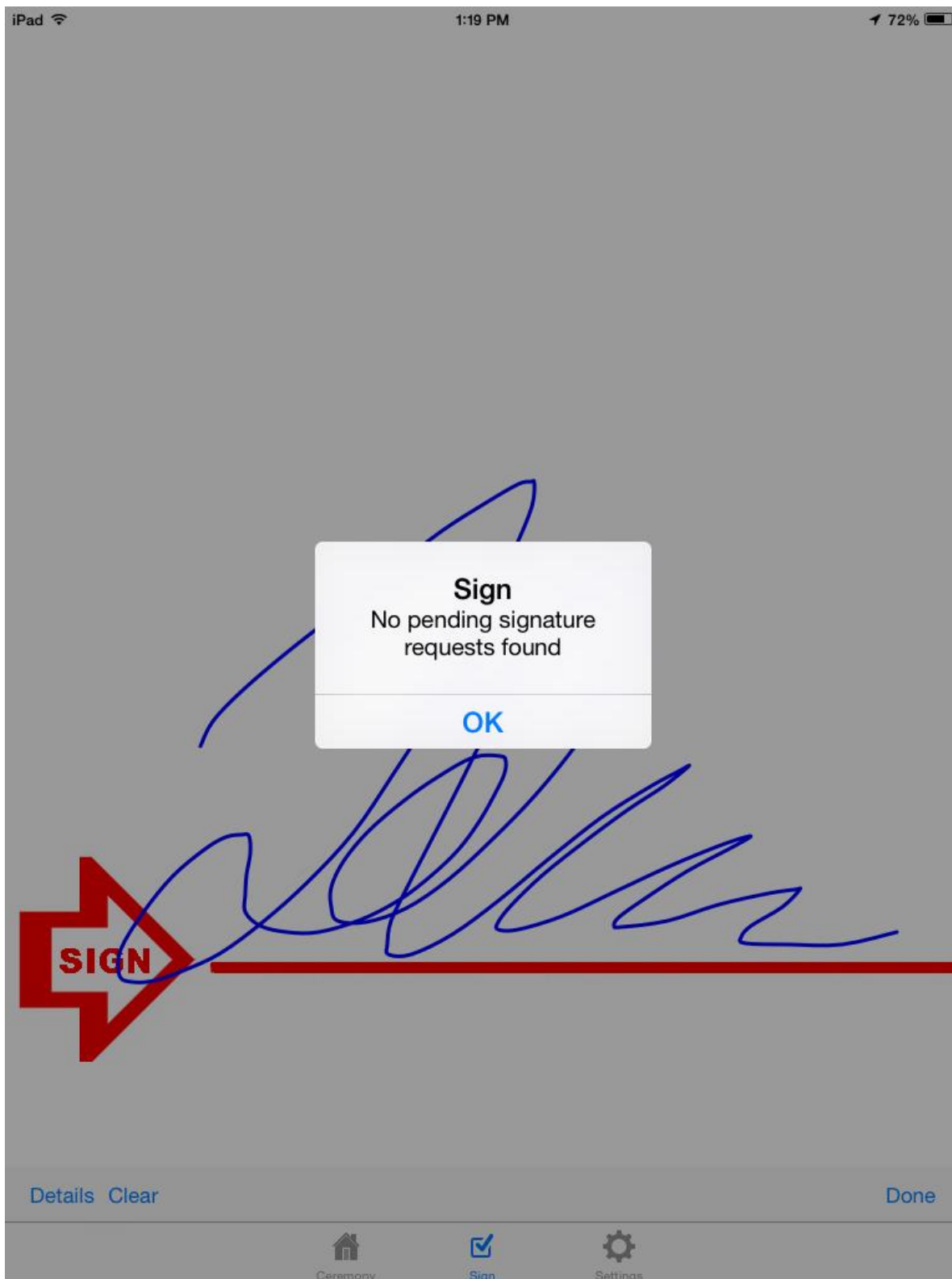
LOCATION

You may enter your location



3.1.4 – Mobile Signature Spot Selection Error

If you try to sign and send a Mobile signature without first selecting a signature spot in the 'Ceremony' tab, an error message such as the one shown below will be displayed.



3.1.4 – Click Signatures

In addition to “Mobile” signatures, “Click” signatures can also be signed using your iPad or iPhone. “Click” signature spots do not require a (squiggle) signature to be captured on the device. Simply clicking on the spot will execute a digital signature. There are two ways to digitally sign a document with a “Click” signature.

- A. **Server Signed** – If local security is not enabled in the settings, clicking on a “Click” signature spot will cause the document to be signed using a server side common certificate (Identity).
- B. **Client Signed** – If local security is enabled, the user will be authenticated using Touch ID or Passcode and if successful, the local Emcee client certificate will be used to sign the document.

3.2 – Successful Signature Transmission

When a signature spot has been signed and the signature has been successfully transmitted to the eSign Emcee server, the iEmcee App will automatically switch back to the ‘Ceremony’ tab to view the signed signature spot. Depending on app configuration in the ‘Settings’ tab, the page may automatically refresh or it may require a manual refresh using the navigation button at the bottom of the ‘Ceremony’ tab.



9. Approval Signatures

Digitally signed by www.esignemcee.net
 ✓ te: 2012.02.18 16:56:54 +00:00

Joe Smith Vice President, Sample Savings and Loan
 Lender

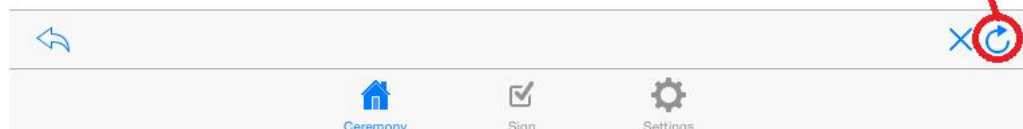
✓  Digitally signed by
 3c3e6585329b7211b588c57c3ef8
 bd97
 Date: 2012.02.18 00:03:45 +00:00

John Doe
 Borrower

✓  Digitally signed by
 3c3e6585329b7211b588c57c3ef8
 bd97
 Date: 2012.02.18 16:59:53 +00:00

Jane Doe
 Borrower

Manual Refresh



4.0 – New Ceremony Notifications

When an iEmcee device is registered with an Emcee user profile, the pending ceremony count for the user is displayed on the iEmcee icon and is synchronized every time a new ceremony is created and after the iEmcee app is dismissed. In addition, when a new ceremony is created, Emcee sends a notification to the registered devices of all the ceremony's signers alerting them to a new pending ceremony.

NOTE: For more information concerning configuring notifications, consult the iOS notifications settings.

